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ABSTRACT

This document contains validated activities and competencies needed by librarians working in a database producer organization. The activities and competencies are organized according to the functions which these librarians perform: acquisitions; thesaurus development and control; indexing/abstracting; and publications and product management. Within each function, competencies are grouped under the categories of Knowledge, Skills, and Attitudes, and three professional levels are dealt with: entry level (0-3 years experience), mid-level (4-9 years experience), and senior level (10 or more years experience). (THC)

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# NEW DIRECTIONS IN LIBRARY AND INFORMATION SCIENCE EDUCATION
# FINAL REPORT
# VOLUME 2.5
# DATABASE PRODUCER PROFESSIONAL COMPETENCIES

1984

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## INTRODUCTION

This document contains validated activities and competencies needed by librarians working in a database producer organization. The following operational definition of competency was developed:

> **A competency is a generic knowledge, skill or attitude of a person that is causally related to effective behavior as demonstrated through external performance criteria, where:**
>
> - **Knowledge is having information about, knowing, understanding, being acquainted with, being aware of, having experience of, or being familiar with something, someone, or how to do something.**
> - **Skill is the ability to use one's knowledge effectively.**
> - **Attitude is a mental or emotional approach to something, or someone.**

We have identified several types of knowledge that are necessary to perform information work satisfactorily as follows:

- Basic knowledge in such areas as language, communication, arithmetic operations, etc.
- Subject knowledge of primary subject fields of users served such as medicine, chemistry, law, etc.
- Library and information work environments such as the information community, its participants and their social, economic and technical interrelationships, etc.
- Knowledge of what work is done such as the activities required to provide services and produce products, etc.
- Knowledge of the organization or user community served such as the mission, goals, and objectives of the user or the organization, user's information needs and requirements, etc.

There appear to be three kinds of skills necessary to perform information work satisfactorily including:

- Basic skills such as cognitive, communication, analytical, etc.
- Skills related to each specific activity being performed such as negotiation of reference questions, evaluation of search outputs, etc.
- Other skills such as managing time effectively, budgeting and making projections, etc.

Attitudes of librarians are found to be extremely important to work performance. We have found it useful to subdivide attitudes into:

- Dispositional attitudes toward one's profession, the organization served, one's work organization, and other people such as users and co-workers.
- Personality traits/qualities such as confidence, inquisitiveness, sense of ethics, flexibility, etc.
- Attitudes related to job/work/organization such as willingness to accept responsibility, willingness to learn, desire to grow, etc.

The activities and competencies are organized according to the functions which librarians perform, and by professional level as displayed in Figure 1. The competencies are cumulative across professional level, i.e., competencies of mid-level professionals include entries shown at the mid-level as well as those at the entry level, etc.

It is important to understand the distinction between functions performed and positions or job titles. Our rationale behind the functional approach was that we were more concerned with what information professionals do than with what they are called. In a single-person library, therefore, the librarian will undoubtedly perform more than a single function. In using and interpreting the competency data in this document, it is important to consider the functions being performed by

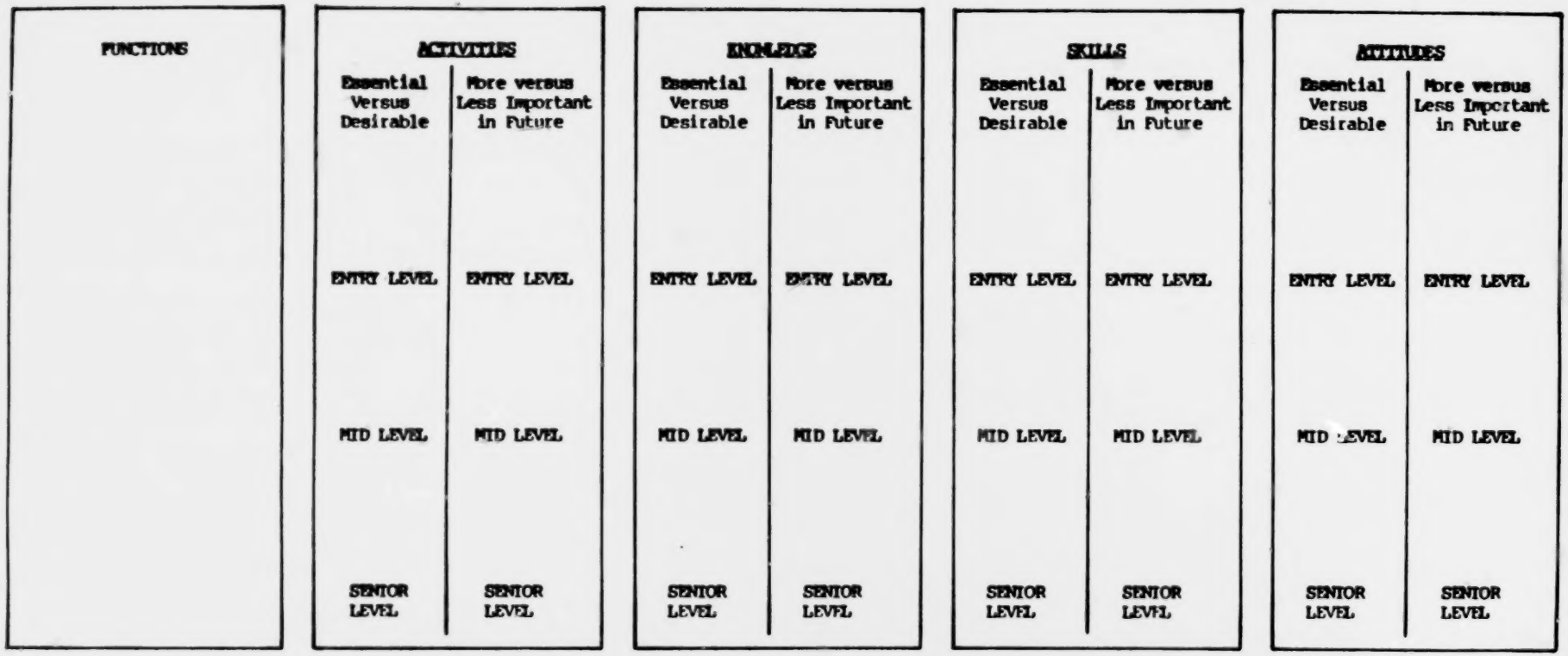


Figure 1 Organization of Activities and Competencies

professionals and the activities being performed to determine which competencies are appropriate. The functions identified for librarians working in database producer organizations are:

- acquisitions
- thesaurus development and control
- indexing/abstracting
- publications and product management.

Three professional levels were defined as follows:

- entry level (up to 3 years of professional experience)
- mid level (4-9 years of professional experience)
- senior level (10 or more years of professional experience).

The activities performed are listed first and numbered sequentially. The actual assignment of individual activities to subcategories of the major activities and to the functions varies from one worksetting to another. The organization of activities that we developed provided us with the "best fit" case. Indented and unnumbered activities are essentially paraprofessional activities which, in small organizations, may be performed by professionals.

The activities are followed by the validated sets of knowledge, skills and attitudes. Two versions of each of the lists are provided. The first set have those competencies designated by the validators as essential in bold face print, and those designated as desirable in regular face print. The level of emphasis is denoted by asterisks as follows:

* denotes each competency rated as essential or desirable by 50-70 percent of the validators of that competency

** denotes each competency rated as essential or desirable by 71-84 percent of that validators of that competency

*** denotes each competency rated as essential or desirable by 85-100 percent of the validators of that competency.

The second set of knowledge, skills, and attitudes have competencies designated by the validators as becoming more or less important in the future. Again, the level of emphasis is denoted by asterisks as follows:

* denotes each competency rated by 1-20 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

** denotes each competency rated by 21-40 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

*** denotes each competency rated by 41-100 percent of those who validated it (as essential, desirable, or not applicable) as becoming more or less important in the future

• denotes competencies rated as <u>currently</u> not applicable which have also been rated as becoming more important in the future.

DATABASE PRODUCER PROFESSIONAL COMPETENCIES

ACQUISITIONS

ACQUISITIONS — ENTRY LEVEL

Verification and Ordering

1. Receive citations for serials/numbered series, selected monographs, reports, conference and workshop proceedings, audiovisuals, etc. approved for inclusion in the indexing database

2. Develop a working knowledge of the subject scope of the indexing database

3. Determine source of procurement for each title ordered (jobber, direct, gift, exchange, etc.)

4. Supervise ordering/claiming of materials to be indexed:

   verify and locate additional bibliographic data as required; refer problems to supervisor
   search records to determine if title is already on order
   prepare/input subscription and non-subscription orders, including the proper "ship to" addresses for materials to be indexed off-site
   prepare/generate purchase orders, if required
   prepare order documentation for mailing, or place orders online with the appropriate suppliers
   forward order documentation to the fiscal control staff for coordination and mailing, if required
   claim outstanding orders
   claim missing issues of serials/numbered series
   cancel orders, as required
   re-issue orders to different sources as required
   order replacement copies of damaged/lost materials
   process subscription renewals
   maintain a statistical record of ordering operations

5. Supervise ordering/requesting sample issues of serials/numbered series for review by the designated senior indexer

6. Search for trade and non-trade bibliographic information that technicians are unable to locate; refer problems to higher level staff, as appropriate

ACQUISITIONS — ENTRY LEVEL

Receipt Processing

7. Supervise receipt processing of materials to be indexed:

   sort incoming items, as appropriate
   search appropriate file to locate the records
   refer items not found in the records to the supervisor
   refer to the supervisor items which differ bibliographically from the item ordered
   update records with receipt of individual items/issues/numbers/parts
   flag serial records for gap filling, as required
   record/affix locator label on each piece; may be bar code/OCR label to allow for tracking of materials in process
   input bibliographic data (standard journal title abbreviation, volume, issue or bibliographic information for monographs, etc.) on the indexing form/record for each item received; (this activity may involve transfer of data from one automated file to another, rather than actual data input on the indexing form/record)
   mark materials with the organization's identification
   affix security labels, if required
   place new serial titles on the appropriate shelf for special file maintenance
   place serials which have title changes on the appropriate shelf for file maintenance
   place materials for indexing on the appropriate trucks
   deliver trucks to proper locations
   annotate receipt on packing slips/invoice copies, if received, and forward to the fiscal control unit
   annotate packing slips/invoice copies for damaged/imperfect or unwanted hardbound series; forward documentation to the fiscal control unit
   prepare damaged/imperfect materials, incorrectly supplied materials, and unwanted materials for return to suppliers, if appropriate
   place surplus materials in specified area to await proper disposal
   maintain record of receipt processing statistics

8. Review materials for which no order records could be found (materials received on approval, as unsolicited sample issues from publishers, as gifts, etc.); dispose of materials definitely outside the scope of the indexing database; forward in-scope and questionable materials to the designated senior indexer

**ACTIVITIES**

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ACQUISITIONS — ENTRY LEVEL

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File Maintenance

9. Supervise creation and maintenance of records for non-serial materials

   input orders/requests, unsolicited receipts
   update records based on correspondence received and actions taken
   update records with receipt, return and disposal information
   delete records at appropriate levels
   maintain statistical records of file creation and maintenance operations

10. Supervise creation and maintenance of serial records:

    input records for new serial titles
    update records with data re: cancellations, reissues, claims, and gap filling
    update records for newly-received titles with indexing assignment (in-house or contract), standard title abbreviation, ISSN, frequency, etc.
    update records with data re: change in frequency, change of title, change in publisher, cessation, change of indexing assignment
    input new records for newly changed titles
    input cross reference records as required
    remove records from the active file when appropriate
    delete records when appropriate
    maintain statistical records of file creation and maintenance operations

Other

11. Handle problems related to ordering and receipt processing of all types of materials and to overall maintenance of the records; refer problems to higher level staff, as appropriate.

12. Conduct business by phone, when appropriate

13. Write memos and letters, as required

14. Prepare manuals of procedures

15. Make recommendations to the section manager for improvement in operations of the unit/section

16. Attend and participate in staff meetings

## ACTIVITIES

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ACQUISITIONS — ENTRY LEVEL

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Other (cont'd)

17. Provide an overview of the operations of the unit/section to visitors, as requested

18. Supervise technicians and other paraprofessional staff

19. Work to develop "esprit de corps" among staff supervised

20. Assist section manager in writing job descriptions for self and for staff supervised

21. Assist section manager in developing performance standards for self and for staff supervised

22. Assist section manager in the review and performance evaluation of staff supervised

23. Assist in the selection of new technicians and paraprofessionals

24. Keep abreast of developments in the information field, library practice, or legislation that affect acquisition and processing of serials/numbered series, monographs, conference proceedings, audio-visuals, etc.

25. Attend professional meetings and prepare reports for dissemination to staff

26. Develop professional contacts both within and outside the organization

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ACQUISITIONS — MID LEVEL

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Verification and Ordering

27. Develop procedures for the verification and ordering of serials/ numbered series and/or other materials selected for indexing

28. Supervise the maintenance of an address file of procurement sources

29. Draft form letters for ordering serials and other materials, claiming/ cancelling orders, claiming missing issues, ordering lost/damaged issues, etc.

ACQUISITIONS — MID LEVEL

Verification and Ordering (cont'd)

30. Work with the appropriate fiscal office to schedule purchases of materials and renewal of subscriptions in order to operate within the budget

31. Work with the appropriate fiscal office to develop procedures for the handling of the final steps in ordering and invoice processing

32. Identify sources for filling gaps

Receipt Processing

33. Develop procedures for receipt processing of all types of materials

File Maintenance

34. Develop procedures for maintenance of records for order/receipt control of serial and non-serial materials

35. Make preliminary selection of forms and/or develop draft record formats for all section files

Fiscal Control

36. Work with the appropriate fiscal office of the parent organization to identify requirements and develop draft procedures for purchasing materials and services (e.g., open ended subscriptions, dealer check-in)

37. Work with the appropriate fiscal office to develop procedures for proper packing slip/invoice handling and receipt certification by section staff

38. Assist the appropriate fiscal office in resolving any problems related to payment for materials

39. Remain aware of the expenditures and balances in the materials account(s); notify the section manager of situations which may require special action

40. Develop projected budget requirements for purchasing materials for the new fiscal year

ACQUISITIONS — MID LEVEL

Other

41. Assess performance of existing equipment/systems/services used in the section and investigate capabilities of other equipment/systems/services

42. Recommend acquisition of new/additional equipment/systems/services

43. Train staff in operation and in-house maintenance of equipment/systems

44. Supervise in-house operation and maintenance of equipment/systems

45. Gather information for maintenance contracts on equipment/systems

46. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

47. Evaluate contractors' proposals

48. Train and supervise entry level staff

49. Assist in the selection of new professional staff

50. Write articles for professional journals/newsletters when appropriate

ACQUISITIONS — SENIOR LEVEL

Selection

51. Forward to the designated senior indexer any publisher/producer-supplied information or any other information on newly/soon-to-be produced materials which should be considered for inclusion in the master indexing database

Verification and Ordering

52. Select and maintain an up-to-date collection of aids to bibliographic verification

ACQUISITIONS — SENIOR LEVEL

Receipt Processing

53. Work with senior staff of the indexing/abstracting section to establish procedures and resolve problems related to the timely receipt of materials for indexing and the input of bibliographic data on indexing forms/records by section staff

54. Work with senior staff and quality and production control staff of the indexing/abstracting section and data processing staff to develop plans and procedures for using the acquisitions files for tracking materials from the time of receipt through completion of the indexing/abstacting workflow

Publications Support

55. Work with senior staff of the indexing and publications management sections to develop procedures and resolve problems related to the regular publication of lists of titles indexed

56. Work with section staff to produce for publication the list of materials currently indexed; include standard journal title abbreviations, ISSNs, references from former title to current title for recent title changes, and standard bibliographic citations for all other materials indexed

Other

57. Function as a technical expert in all matters related to acquisitions

58. Interview dealers' representatives to learn about the particular services they offer

59. Identify dealers who have a good performance record in supplying irregular serials, conference/congress proceedings, and other materials which are difficult to acquire

**ACTIVITIES**

| ACQUISITIONS | SENIOR LEVEL |
|---|---|

Other (cont'd)

60. Assist the section manager in negotiating with dealers' representatives to obtain the required level of service in acquiring and/or processing materials

61. Evaluate dealers' performance and report to section manager

62. Draft section procedures and policies; draft revisions as required

63. Flowchart and document section procedures

64. Assist section manager in on-going systems analysis of the section

65. Analyze statistics for all operations in the section and prepare draft statistical reports

66. Train and supervise mid level staff

67. Assist section manager in preparing the annual budget for section operations

68. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

ACQUISITIONS — ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

* knowledge of the primary subject field of users served (e.g. medicine, chemistry, law, etc.)
** knowledge of foreign languages

Library & Information Science Knowledge (Generic)

** knowledge of definition, structure, and formats of information
*** knowledge of alternative approaches to the organization of information
*** knowledge of alternative approaches to retrieval of information
*** knowledge of alternative approaches to information management
** knowledge of available and emerging information technologies and their applications
** knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities

** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
*** knowledge of acquisitions tools and sources of bibliographic information
*** knowledge of acquisitions methods and techniques
** knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

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ACQUISITIONS — ENTRY LEVEL

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Knowledge of how to do work

*** knowledge of how to perform the various activities (e.g., request sample issues of selected serials/numbered series, develop a working knowledge of the subject scope of the index database, supervise ordering of serials/numbered series, selected monographs and reports, audiovisual materials, etc.)
** knowledge of how to use the acquisitions tools and sources of bibliographic information
*** knowledge of how to apply the acquisitions methods and techniques

* knowledge of personnel procedures

Knowledge of the organization and the specific work unit

* knowledge of the mission, goals and objectives of the organization
* knowledge of the structure of the organization and the role of the acquisitions section within the organization
** knowledge of the various projects and key personnel within the organization
*** knowledge of the policies and procedures relevant to section operations
** knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
* knowledge of the users' information needs and requirements

---

ACQUISITIONS — MID LEVEL

---

** greater depths of knowledge specified above
** knowledge of the operations of other sections in the organization and how they relate to acquisitions
* knowledge of available vendor-supplied systems, services and products to support acquisitions
* knowledge of the contracting process, both in general and within the organization
** knowledge of evaluation methods and techniques to evaluate systems, services and products

ACQUISITIONS — SENIOR LEVEL

*** greater depths of knowledge specified above
knowledge of public relations techniques
** knowledge of statistical description, analysis, interpretation and presentation
** knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
** knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the section
** state-of-the-art knowledge of library research and practice as it relates to the acquisition of print and non-print materials and the support of indexing operations

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

ACQUISITIONS — ENTRY LEVEL

Subject knowledge

* knowledge of the primary subject field of users served (e.g. medicine, chemistry, law, etc.)
* knowledge of foreign languages

Library & Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

* knowledge of acquisitions tools and sources of bibliographic information
* knowledge of acquisitions methods and techniques

Knowledge of how to do work

* knowledge of personnel procedures

Knowledge of the organization and the specific work unit

* knowledge of the various projects and key personnel within the organization
* knowledge of the users' information needs and requirements

## KNOWLEDGE

ACQUISITIONS — MID LEVEL

* knowledge of the operations of other sections in the organization and how they relate to acquisitions
* knowledge of available vendor-supplied systems, services and products to support acquisitions
* knowledge of the contracting process, both in general and within the organization

ACQUISITIONS — SENIOR LEVEL

** knowledge of statistical description, analysis, interpretation and presentation
* knowledge of the costs associated with resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the section
* state-of-the-art knowledge of library research and practice as it relates to the acquisition of print and non-print materials and the support of indexing operations

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

## SKILLS

---

ACQUISITIONS — ENTRY LEVEL

---

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

** perform each activity
* establish rapport with colleagues
* communicate well by written, verbal and non-verbal means
** conduct meetings with individuals and groups
** collect, analyze and interpret data
* make decisions and recommendations based on available information
supervise staff
* work independently and in groups
** develop criteria for evaluation
* make effective, timely, and well-informed decisions
* isolate and define problems and develop the necessary criteria and action for their solution
* manage time effectively

---

ACQUISITIONS — MID LEVEL

---

Skills Related to Each Specific Activity

* Skills listed above are developed to a greater extent

Ability to:

* perceive the needs of the organization and not just the section
* anticipate long-range needs of the section
* design systems and procedures to improve section operations
arbitrate and negotiate

---

ACQUISITIONS — SENIOR LEVEL

---

*** Skills listed above are developed to a greater extent

Ability to:

** apply methods of measurement and evaluation
** budget and make projections
** optimise the use of section and organizational resources

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

## SKILLS

---

ACQUISITIONS — ENTRY LEVEL

---

Skills Related to Specific Activities

Ability to:

** perform each activity
* manage time effectively

---

ACQUISITIONS — MID LEVEL

---

Skills Related to Each Specific Activity

Ability to:

* perceive the needs of the organization and not just the section
* anticipate long-range needs of the section
* design systems and procedures to improve section operations

---

ACQUISITIONS — SENIOR LEVEL

---

Ability to:

* apply methods of measurement and evaluation
* budget and make projections
* optimize the use of section and organizational resources

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

## ATTITUDES

### ACQUISITIONS

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
* Respect for the section
* Respect for the parent organization

Attitudes Toward Other People

Toward Users

** Respect users
* Like people in general
Like to help people
Like to meet people
Like to make others feel comfortable
* Sensitive to others' needs

Toward Others in the Workplace

** Respect co-workers
** Like to work with others/as a team
* Like to work on own
* Willingness to draw upon and share knowledge and experience with others
* Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

*** Alertness
** Assertiveness
* Compassion/Kindness
* Confidence
** Cheerfulness
*** Dependability
** Determination/Tenacity
*** Diplomacy
Emotional stability
Fairness
* Flexibility/Versatility
** Imagination
* Inquisitiveness
** Leadership ability
*** Neatness
** Need for achievement

ACQUISITIONS

Personal Qualities (cont'd)

* Objectivity
* Open-mindedness
*** Optimism/Positive attitude
*** Organization
* Patience
* Physical endurance
* Resourceful
Sensitive/Thoughtful
** Sense of humor
* Sense of ethics
** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

** Willingness to take/accept responsibility
* Willingness to take initiative
** Willingess to respond to authority, apply and follow policy
** Realization that there is no single "right" way to achieve the goals of the section/organization
* Desire to learn/try
* Willingness to fail
** Willingness to ask questions
** Desire to work to best of ability
** Responsiveness to time constraints
*** Accuracy
** Willingness to get hands dirty
*** Attention to detail
** Willingness to do clerical tasks
** Desire to follow-through
** Service orientation
*** Organizational identity
** Willingness to promote parent organization and its services
*** View of parent organization as part of a larger information environment
* Ability to see broad picture
** Ability to sacrifice short-term gains for long-term goals
** Political sense
*** Curiosity
** Variety of interests
** Desire to grow personally
*** Desire to grow professionally
* Desire to remain current in specific and general subject field
* Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

## ATTITUDES

---

ACQUISITIONS

---

Dispositional Attitudes

Attitudes Toward Other People

Toward Others in the Workplace

* Willingness to draw upon and share knowledge and experience with others

Personal Qualities

* Alertness
* Need for achievement

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

* Responsiveness to time constraints
* Willingness to do clerical tasks

DATABASE PRODUCER PROFESSIONAL COMPETENCIES

THESAURUS DEVELOPMENT & CONTROL

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Development

1. Determine the method (manual or automated) and procedures by which the thesaurus data will be compiled
2. Determine the data elements to be included for each subject term
3. Design the forms to be used for data collection
4. Develop a basic list of terms in the selected subject field(s) through review of basic texts, reference works, abstracting and indexing tools, existing thesauri in the field(s), etc.
5. Categorize the terms and develop taxonomies
6. Review the term lists for semantic and syntactic consistency
7. Develop written guidelines to ensure that the semantic and syntactic consistency may be maintained as the thesaurus is updated
8. Develop written guidelines concerning the nature and structure of the various types of cross references
9. Complete data entry forms for cross-references for hierarchically, horizontally, and otherwise related terms
10. Add annotations to subject terms, as required
11. Supervise the production of the alphabetical listing of subject terms and cross references and the listing of taxonomies
12. Review and correct term lists
13. Submit the term lists to subject experts for review, if appropriate
14. Supervise the correction of the master term lists
15. Prepare introductory material to be included in the printed thesaurus
16. Work with publications management staff and data processing staff (if appropriate) to arrange for publication of the thesaurus
17. Perform proofreading of assigned sections of the thesaurus, as required

**ACTIVITIES**

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THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

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Control

18. Review suggestion forms received from the indexing section for changes/ additions to the approved thesaurus

19. Review assigned taxonomies on a regular basis to determine if changes/ additions to the approved listings should be recommended

20. Check the subject literature and the indexing database for use of the suggested/questioned terms

21. Evaluate findings and determine the appropriate action to be taken: recommend establishment of a new subject term; recommend a change in an existing term; recommend replacement of an existing subject term by a new subject term; recommend conversion of a cross reference term to an approved thesaurus term; recommend establishment of a new cross reference term; recommend restructuring of an entire area of the taxonomy; recommend no change in the existing term, etc.

22. Prepare appropriate documentation to support each recommendation

23. Prepare appropriate data entry forms for each recommended addition/ change to the thesaurus

24. Submit documentation re: changes to the thesaurus to the section manager for review and circulation to section staff and appropriate in-house staff

25. Attend and participate in meetings to discuss and act on proposed changes to the thesaurus

26. Supervise input of approved changes/additions to the master thesaurus database

27. Prepare introductory material to be included in each new edition of the thesaurus

28. Work with publications management staff and data processing staff (if appropriate) to develop procedures and establish schedules for the regular publication of new editions of the thesaurus

29. Work with senior staff of the indexing section and data processing staff to develop procedures for regular maintenance of the subject headings in the indexing database which have been changed in or deleted from the thesaurus database

30. Perform proofreading of assigned sections of new editions of the thesaurus, as required

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Other

31. Function as an expert in assigned subject areas

32. Establish and maintain contact with subject experts in the field who are working in assigned subject areas and who may supply expert advice upon request

33. Maintain an up-to-date collection of reference works in assigned subject areas to support subject reference needs

34. Attend professional meetings in assigned subject areas and in the information field; prepare reports for dissemination to staff

35. Keep abreast of developments in the information field that affect thesaurus development

36. Develop contacts with other information professionals both within and outside the parent organization

37. Participate in in-house committees which require specific subject and/or language expertise

38. Perform special studies, as assigned

39. Forward recommendations for materials to be included regularly in the indexing database to the designated senior indexer

40. Conduct business by phone, when appropriate

41. Write memos and letters, as required

42. Maintain a record of work performed

43. Make recommendations to the section manager for improvement in operation of the section

44. Attend and participate in staff meetings

45. Provide as overview of the operations of the section to visitors, as requested

46. Train and supervise support staff, as required

47. Work to develop "esprit de corps" among co-workers and staff supervised

48. Assist section manager in writing job descriptions for self and for staff supervised

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Other (cont'd)

49. Assist section manager in developing performance standards for self and for staff supervised

50. Assess performance of existing equipment/systems used in the section and investigate capabilities of other equipment/systems

51. Recommend acquisition of new/additional equipment/systems

52. Train section staff in operation and maintenance of equipment/systems

53. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

54. Evaluate contractor's proposals

55. Write articles for professional journals/newsletters

56. Draft statements of section procedures and policies; draft revisions as required

57. Flowchart and document section procedures

58. Prepare manuals of procedures

59. Assist section manager in on-going systems analysis of the section

60. Analyze statistics for all operations in the section and prepare draft statistical reports

61. Assist section manager in preparing the annual budget for section operations

62. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

*** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
*** knowledge in greater depth in specific subjects, (e.g., neuroanatomy, neurophysiology, neurosurgery, etc.)

Information Science Knowledge (Generic)

** knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
** knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
** knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the variety of work settings and their organizational structures
** knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the thesaurus development and control functions, the range of services and products offered (both actual and potential)
*** knowledge of the activities that are required to offer the services and produce the products
* knowledge of the various resources that are necessary to support the activities
*** knowledge of reference tools in specific subject areas
*** knowledge of methods and techniques for thesaurus development and control
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities
*** knowledge of how to use specific tools for thesaurus development and control
*** knowledge of how to apply the methods and techniques of thesaurus development and control
** knowledge of proofreading techniques and procedures
* knowledge of personnel procedures
* knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products
** knowledge of statistical description, analysis, interpretation and presentation
* knowledge of available systems, services and products to support thesaurus development and control
* knowledge of the costs associated with resources (materials, personnel, space, etc.)
** knowledge of cost analysis and interpretation methods
** knowledge of methods of resource allocation
** knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the section
** state-of-the-art knowledge of research and practice in thesaurus development and control techniques

Knowledge of the organization and specific work unit

*** knowledge of the mission, goals and objectives of the organization
* knowledge of the structure of the organization and the role of the section within the organization
* knowledge of the various projects and key personnel within the organization
** knowledge of the policies and procedures relevent to section operations
* knowledge of the various resources available within the organization (e.g., personnel, equipment, etc.)
*** knowledge of how the thesaurus terms are used by indexers
* knowledge of the operations of other sections in the organization and how they relate to thesaurus development and control

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Subject knowledge

** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
** knowledge in greater depth in specific subjects, (e.g., neuroanatomy, neurophysiology, neurosurgery, etc.)

Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
** knowledge of alternative approaches to retrieval of information
** knowledge of alternative approaches to information management
*** knowledge of available and emerging information technologies and their applications
*** knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
* knowledge of how to learn on an ongoing basis

Knowledge about information work environments

** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the variety of work settings and their organizational structures
** knowledge of the functions performed within the various work settings and the services and products offered
*** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

* knowledge of reference tools in specific subject areas
*** knowledge of methods and techniques for thesaurus development and control
* knowledge of performance expected and how it can be measured

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Knowledge of how to do work

* knowledge of how to perform the various activities
* knowledge of how to use specific tools for thesaurus development and control
* knowledge of how to apply the methods and techniques of thesaurus development and control
* knowledge of evaluation methods and techniques to evaluate systems, services and products
* knowledge of statistical description, analysis, interpretation and presentation
** knowledge of available systems, services and products to support thesaurus development and control
* state-of-the-art knowledge of research and practice in thesaurus development and control techniques

Knowledge of the organization and specific work unit

* knowledge of the mission, goals and objectives of the organization
* knowledge of the structure of the organization and the role of the section within the organization
* knowledge of the various resources available within the organization (e.g., personnel, equipment, etc.)
* knowledge of how the thesaurus terms are used by indexers

**COMPETENCIES VALIDATED AS ESSENTIAL VERSUS DESIRABLE**

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

* perform each activity
*** apply consistently the guidelines for thesaurus development and control
** locate and use appropriate reference tools to provide subject support in thesaurus development and control
*** perceive the information needs of the thesaurus user
* establish rapport with colleagues
** communicate well by written, verbal and non-verbal means
** collect, analyze and interpret data
** make decisions and recommendations based on available information
*** work independently and in groups
*** perform sedentary work
** develop criteria for evaluation
** make effective, timely, and well-informed decisions
** isolate and define problems and develop the necessary criteria and action for their solution
** manage time effectively
** conduct an interview
* conduct meetings with individuals and groups
* supervise staff
arbitrate and negotiate
* anticipate long-range needs of the section
* design systems and procedures to improve section operations
* apply methods of measurement and evaluation
* budget and make projections
* optimize the use of organizational and section resources

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

THESAURUS DEVELOPMENT & CONTROL — SENIOR LEVEL

Skills Related to Specific Activities

Ability to:

* apply consistently the guidelines for thesaurus development and control
* locate and use appropriate reference tools to provide subject support in thesaurus development and control
* perceive the information needs of the thesaurus user
** establish rapport with colleagues
* communicate well by written, verbal and non-verbal means
* develop criteria for evaluation
* anticipate long-range needs of the section
* design systems and procedures to improve section operations
* budget and make projections
* optimize the use of organizational and section resources

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

THESAURUS DEVELOPMENT & CONTROL

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
* Respect for the thesaurus development and control section
* Respect for the parent organization

Attitudes Toward Other People

Toward Users

** Respect users
* Like people in general
Like to help people
** Sensitive to others' needs

Toward Others in the Workplace

* Respect co-workers
Like to work with others/as a team
* Like to work on own
** Willingness to draw upon and share knowledge and experience with others
* Supportive of co-workers
* Enjoy managing/supervising others

Personal Qualities

** Alertness
* Assertiveness
** Confidence
*** Dependability
* Determination/Tenacity
* Diplomacy
* Emotional stability
** Fairness
* Flexibility/Versatility
* Imagination
** Inquisitiveness
*** Leadership ability
** Neatness
** Need for achievement
*** Objectivity
** Open-mindedness
* Optimism/Positive attitude

THESAURUS DEVELOPMENT & CONTROL

Personal Qualities (cont'd)

*** Organization
** Patience
** Resourceful
Sensitive/Thoughtful
* Sense of humor
** Sense of ethics
** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

** Willingness to take/accept responsibility
*** Willingness to take initiative
*** Willingness to respond to authority, apply and follow policy
* Realization that there is no single "right" way to achieve the goals of the section/organization
*** Desire to learn/try
* Willingness to fail
** Willingness to ask questions
* Desire to work to best of ability
** Responsiveness to time constraints
*** Accuracy
* Willingness to get hands dirty
*** Attention to detail
* Willingness to do clerical tasks
*** Desire to follow-through
** Service orientation
* Organizational identity
** Willingness to promote parent organization and its services
* View of parent organization as part of a larger information environment
*** Ability to see broad picture
* Ability to sacrifice short-term gains for long-term goals
* Political sense
* Curiosity
Variety of interests
* Desire to grow personally
* Desire to grow professionally
*** Desire to remain current in specific and general subject field
* Positive attitude toward job

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

THESAURUS DEVELOPMENT & CONTROL

Dispositional Attitudes

Attitudes Toward Other People

Toward Users

* Respect users

Toward Others in the Workplace

* Like to work with others/as a team
* Willingness to draw upon and share knowledge and experience with others
* Enjoy managing/supervising others

Personal Qualities

* Alertness
* Dependability
* Imagination
** Inquisitiveness
* Organization
* Sensitive/Thoughtful

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

* Desire to learn/try
* Accuracy
* Service orientation
* View of parent organization as part of a larger information environment
* Curiosity
** Variety of interests
* Desire to grow personally
** Desire to remain current in specific and general subject field

DATABASE PRODUCER PROFESSIONAL COMPETENCIES

INDEXING/ ABSTRACTING

INDEXING/ABSTRACTING — ENTRY LEVEL

1. Receive material to be indexed
2. Log in each piece as indexing begins
3. Review preliminary data (standard journal title abbreviation or other title information, volume, issue, pagination, article/chapter title, author(s), author affiliation, other bibliographic information, abstract) entered on the indexing form/record for accuracy
4. Make corrections to preliminary data, if required
5. Translate titles, if required, and enter on the indexing form/record
6. Read/scan the item to be indexed and identify the main theme and sub-themes
7. Enter check tag data on the indexing form/record, if applicable
8. Select the appropriate headings/heading-subheading combinations from the approved thesaurus
9. Enter the headings/heading-subheading combinations on the indexing form/record
10. Mark the subject terms under which the item should be cited in the printed index, if applicable. Additional unmarked subject terms, representing sub-themes in the item, will retrieve the cited item online only
11. Prepare abstracts or annotations, as required
12. Add comments/questions for the reviser on the indexing form/record, if necessary
13. Flag pieces which may require additional processing for inclusion in other indexes/databases

Other

14. Perform proofreading of printed index page proofs as required
15. Complete necessary forms to suggest changes/additions to the approved thesaurus; forward forms to the reviser
16. Make recommendations to the section manager for improvement in the operations of the section
17. Maintain a statistical record of work performed

INDEXING/ABSTRACTING — ENTRY LEVEL

Other (cont'd)

18. Write memos, as required

19. Attend and participate in staff meetings

20. Provide an overview of the operations of the section to visitors, as requested

21. Assist section manager in writing/updating the job description for entry level indexers

22. Assist section manager in developing performance standards for entry level indexers

23. Keep abreast of developments in the information field that affect indexing and abstracting

24. Attend professional meetings and prepare reports for dissemination to staff

25. Develop professional contacts both within and outside the section and the parent organization

INDEXING/ABSTRACTING — MID LEVEL

26. Index and abstract the more difficult materials and the selectively indexed/abstracted materials

Quality and Production Control

27. Receive materials to be indexed from the acquisitions section

28. Review materials for presence of proper locator labels; may be bar code/OCR labels to allow for tracking of materials in process

29. Review indexing forms/records for accuracy of bibliographic data input by acquisitions staff

30. Forward materials for descriptive indexing to in-house/contract staff:

    editorial staff mark article/chapter title, author(s), author affiliation, and abstract
    keyboarding staff input data

INDEXING/ABSTRACTING — MID LEVEL

Quality and Production Control (cont'd)

31. Keep a record (manual/automated) of the location of materials in process

32. Review/spot check accuracy of editorial and keyboarding staff/ contractor

33. Forward materials to be distributed for indexing to the appropriate senior indexer. Notify him/her of any problems which may affect the volume of material to be indexed

34. Train and supervise technicians who proof the completed indexing forms/records before they are released for publication processing

35. Run established search profiles and forward/release indexing data to the designated organizational unit for publication/product processing according to established schedules

36. Coordinate the proofreading of page proofs by section staff

37. Draft statements of work for request-for-proposals for contract data entry

38. Evaluate contractors' proposals

39. Act as project officer for contract services for data entry

Other

40. Review periodically the contents of the online dictionary, if applicable. Delete terms, as required

41. Work with a senior indexer (reviser) on a one-to-one basis to learn revision procedures and to develop the necessary skills

42. Participate in in-house committees which require specific subject and/or language expertise

43. Perform special studies, as assigned

44. Work to develop "esprit de corps" among staff supervised

45. Assist section manager in writing job descriptions for self and for staff supervised

46. Assist section manager in developing performance standards for self and for staff supervised

INDEXING/ABSTRACTING — MID LEVEL

Other (cont'd)

47. Assist section manager in the review and performance evaluation of staff supervised

48. Assist section manager in the selection of new technicians

49. Prepare manuals of procedures for in-house technicians and for data entry contractors

INDEXING/ABSTRACTING — SENIOR LEVEL

50. Function as a technical expert/reviser in the section

51. Distribute work to indexers according to priority and language and/or subject expertise

52. Revise/review the work of all in-house/contract indexers

53. Respond to questions posed by revisees

54. Supervise the forwarding of all processed materials to the proper organizational unit for storage or disposal

55. Document performance of revisees

56. Prepare and conduct formal training/update classes for all in-house/contract indexers

Selection

57. Formulate a draft policy statement and guidelines for the selection of materials to be indexed/abstracted (fully or selectively) for inclusion in the master index database

58. Review citations/issues received from organizational staff and from publishers for possible inclusion in the indexing database; recommend titles for inclusion

59. Work with the section manager to coordinate the annual review by senior organizational staff and/or advisory groups of the list of journals, monographic series, report series, etc. currently indexed

INDEXING/ABSTRACTING — SENIOR LEVEL

Other

60. Keep abreast of bibliographic standards for indexing and abstracting; incorporate these standards into section procedures

61. Work with the section manager to determine/revise the processing priority assigned to each title indexed

62. Prepare introductory material to be included in each issue of the printed index and in cumulations

63. Together with the indexing quality and production control supervisor, work with data processing staff (if appropriate) and publications management staff to establish procedures and resolve problems related to the publication/release of the indexes/databases on a regular basis

64. Work with senior staff of the thesaurus development and control section and data processing staff (if applicable) to develop procedures for regular maintenance of subject headings in the indexing database which have been changed in or deleted from the thesaurus database

65. Develop and maintain appropriate search profiles to retrieve subsets of the master indexing database for processing for distribution as separate publications/databases

66. Recommend new products which may be developed from the master indexing database

67. Work with senior staff of the acquisitions section to establish procedures and resolve problems related to the timely receipt of materials for indexing, input of bibliographic data on the indexing form/record by acquisitions staff, and the regular production of lists of titles indexed for inclusion in the printed index

68. Review indexing staff suggestions for changes/additions to the approved thesaurus; confer with section manager and other senior level indexers, as appropriate

69. Act as liaison between the indexing section and the thesaurus control section on all questions related to use/modification of the approved thesaurus

70. Prepare/update manuals of indexing and abstracting policies and procedures for in-house/contract indexers

71. Maintain an up-to-date collection of reference works to support the respective subject reference needs of the indexers

INDEXING/ABSTRACTING — SENIOR LEVEL

Other (cont'd)

72. Work with the section manager to establish and/or revise standards of performance for all levels of indexers

73. Flowchart and document all section procedures

74. Assist section manager in on-going systems analysis of the section

75. Assess performance of existing equipment and/or systems (manual or automated) used in the section and investigate capabilities of other equipment/systems

76. Recommend acquisition of new/additional equipment/systems

77. Train staff in operation and in-house maintenance of equipment/systems

78. Supervise in-house operation and maintenance of equipment/systems

79. Assist in the selection of new professional staff

80. Write articles for professional publications when appropriate

81. Analyze statistics for all operations in the section and prepare draft statistical reports

82. Assist the section manager in preparing the annual budget for section operations

83. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

INDEXING/ABSTRACTING — ENTRY LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

*** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
* knowledge in greater depth in specific subjects, (e.g., neuroanatomy, neurophysiology, neurosurgery, etc.)
** knowledge of foreign languages

Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
** knowledge of alternative approaches to information management
** knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the variety of work settings and their organizational structures
** knowledge of the functions performed within the various work settings and the services and products offered
** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the indexing and abstracting functions, the range of services and products offered (both actual and potential)
** knowledge of the activities that are required to offer the services and produce the products
* knowledge of the various resources that are necessary to support the activities
*** knowledge of indexing tools
*** knowledge of indexing and abstracting methods and techniques
*** knowledge of performance expected and how it can be measured
*** knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

INDEXING/ABSTRACTING — ENTRY LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities (e.g., review descriptive indexing for accuracy, perform subject indexing, enter data on the indexing form/record, etc.)
*** knowledge of how to use the indexing tools
*** knowledge of how to apply the indexing and abstracting methods and techniques
*** knowledge of proofreading techniques and procedures
* knowledge of personnel procedures

Knowledge of the organization and specific work unit

* knowledge of the mission, goals and objectives of the organization
** knowledge of the structure of the organization and the role of the section within the organization
*** knowledge of the various projects and key personnel within the organization
*** knowledge of the policies and procedures relevant to the section operations
* knowledge of the various resources available within the organization (e.g., personnel, equipment, etc.)
* knowledge of the users' information needs and requirements

INDEXING/ABSTRACTING — MID LEVEL

*** greater depths of knowledge specified above
** knowledge of the operations of other sections in the organization and how they relate to indexing/abstracting
*** knowledge of the contracting process, both in general and within the organization
** knowledge of evaluation methods and techniques to evaluate systems, services and products
*** knowledge of quality and production control techniques and procedures

INDEXING/ABSTRACTING — SENIOR LEVEL

*** greater depths of knowledge specified above
** knowledge of public relations techniques
** knowledge of statistical description, analysis, interpretation and presentation
knowledge of available vendor-supplied systems, services and products to support indexing/abstracting
* knowledge of the costs associated with resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
** knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the section
** state-of-the-art knowledge of research and practice in indexing and abstracting techniques

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

INDEXING/ABSTRACTING — ENTRY LEVEL

Subject knowledge

** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
*** knowledge in greater depth in specific subjects, (e.g., neuroanatomy, neurophysiology, neurosurgery, etc.)
* knowledge of foreign languages

Information Science Knowledge (Generic)

*** knowledge of definition, structure, and formats of information
*** knowledge of alternative approaches to the organization of information
*** knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
*** knowledge of available and emerging information technologies and their applications
*** knowledge of completed and ongoing research in the field and its applicability to practice
*** knowledge of career opportunities
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

** knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
** knowledge of the functions performed within the various work settings and the services and products offered
*** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

** knowledge of the indexing and abstracting functions, the range of services and products offered (both actual and potential)
* knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
** knowledge of indexing tools
** knowledge of indexing and abstracting methods and techniques
* knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

INDEXING/ABSTRACTING — ENTRY LEVEL

Knowledge of how to do work

** knowledge of how to perform the various activities
** knowledge of how to use the indexing tools
** knowledge of how to apply the indexing and abstracting methods and techniques
* knowledge of proofreading techniques and procedures

Knowledge of the organization and specific work unit

* knowledge of the mission, goals and objectives of the organization
* knowledge of the structure of the organization and the role of the section within the organization
* knowledge of the various projects and key personnel within the organization
* knowledge of the policies and procedures relevant to the section operations
* knowledge of the various resources available within the organization (e.g., personnel, equipment, etc.)
** knowledge of the users' information needs and requirements

INDEXING/ABSTRACTING — MID LEVEL

* greater depths of knowledge specified above
** knowledge of the operations of other sections in the organization and how they relate to indexing/abstracting
** knowledge of the contracting process, both in general and within the organization
* knowledge of evaluation methods and techniques to evaluate systems, services and products
** knowledge of quality and production control techniques and procedures

| INDEXING/ABSTRACTING | SENIOR LEVEL |
|---|---|

* greater depths of knowledge specified above
* knowledge of public relations techniques
* knowledge of statistical description, analysis, interpretation and presentation
** knowledge of available vendor-supplied systems, services and products to support indexing/abstracting
* knowledge of the costs associated with resources (materials, personnel, space, etc.)
** knowledge of cost analysis and interpretation methods
** knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
* knowledge of alternative management structures and their implications for the operation of the section
* state-of-the-art knowledge of research and practice in indexing and abstracting techniques

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

INDEXING/ABSTRACTING — ENTRY LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

* perform each activity
*** apply indexing and abstracting rules consistently
** perceive the information needs of the data user
* establish rapport with colleagues
** communicate well by written, verbal and non-verbal means
** collect, analyze and interpret data
*** make decisions and recommendations based on available information
** work independently and in groups
*** perform sedentary work
develop criteria for evaluation
** make effective, timely, and well-informed decisions
** isolate and define problems and develop the necessary criteria and action for their solution
*** manage time effectively

INDEXING/ABSTRACTING — MID LEVEL

Skills Related to Each Specific Activity

*** Skills listed above are developed to a greater extent

Ability to:

conduct an interview
* conduct meetings with individuals and groups
supervise staff
arbitrate and negotiate

INDEXING/ABSTRACTING — SENIOR LEVEL

*** Skills listed above are developed to a greater extent

Ability to:

* anticipate long-range needs of the section
* design systems and procedures to improve section operations
** apply methods of measurement and evaluation
* budget and make projections
** optimize the use of organizational and section resources

COMPETENCIES VALIDATED AS BECOMING
MORE VERSUS LESS IMPORTANT
IN THE FUTURE

## SKILLS

INDEXING/ABSTRACTING — ENTRY LEVEL

Skills Related to Specific Activities

Ability to:

** apply indexing and abstracting rules consistently
** perceive the information needs of the data user
* communicate well by written, verbal and non-verbal means
* perform sedentary work
* make effective, timely, and well-informed decisions
** manage time effectively

INDEXING/ABSTRACTING — MID LEVEL

Skills Related to Each Specific Activity

* Skills listed above are developed to a greater extent

Ability to:

* conduct an interview
* conduct meetings with individuals and groups
* supervise staff
* arbitrate and negotiate

INDEXING/ABSTRACTING — SENIOR LEVEL

* Skills listed above are developed to a greater extent

Ability to:

** anticipate long-range needs of the section
* design systems and procedures to improve section operations
** budget and make projections
** optimize the use of organizational and section resources

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

## ATTITUDES

### INDEXING/ABSTRACTING

Dispositional Attitudes

Attitudes Toward Institutions

* Respect for profession
* Respect for the section
* Respect for the parent organization

Attitudes Toward Other People

Toward Users

*** Respect users
** Like people in general
*** Like to help people
* Sensitive to others' needs

Toward Others in the Workplace

*** Respect co-workers
** Like to work with others/as a team
** Like to work on own
* Willingness to draw upon and share knowledge and experience with others
* Supportive of co-workers

Personal Qualities

*** Alertness
* Assertiveness
** Compassion/Kindness
* Confidence
*** Cheerfulness
*** Dependability
** Determination/Tenacity
*** Diplomacy
Emotional stability
* Fairness
* Flexibility/Versatility
*** Imagination
* Inquisitiveness
Leadership ability
** Neatness
*** Need for achievement
*** Objectivity

INDEXING/ABSTRACTING

Personal Qualities (cont'd)

*** Open-mindedness
** Optimism/Positive attitude
* Organization
** Patience
Physical endurance
*** Resourceful
*** Sensitive/Thoughtful
*** Sense of humor
** Sense of ethics
** Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

** Willingness to take/accept responsibility
* Willingness to take initiative
*** Willingness to respond to authority, apply and follow policy
** Realization that there is no single "right" way to achieve the goals of the section/organization
*** Desire to learn/try
*** Willingness to ask questions
** Desire to work to best of ability
*** Responsiveness to time constraints
*** Accuracy
*** Attention to detail
** Willingness to do clerical tasks
** Desire to follow-through
* Service orientation
** Organizational identity
* Willingness to promote parent organization and its services
* View of parent organization as part of a larger information environment
* Ability to see broad picture
*** Ability to sacrifice short-term gains for long-term goals
** Curiosity
* Variety of interests
** Desire to grow personally
* Desire to grow professionally
** Desire to remain current in specific and general subject field
** Positive attitude toward job

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DATABASE PRODUCER PROFESSIONAL COMPETENCIES

PUBLICATIONS AND PRODUCT MANAGEMENT

**ACTIVITIES**

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Planning

1. Work with senior staff of various sections to identify regular publications (in hardcopy or microform) and special data products (computer tapes for distribution to database distributors, special reports and listings, reprints, data supplied to special subject interest groups for publication of bibliographies, etc.) which may be developed from the master indexing, thesaurus, and acquisitions databases or which may be prepared by organization staff

2. Contract for/conduct market surveys to identify the potential need, demand for, and response to the various planned publications/products

3. Recommend modifications to planned publications/products based on analyses of market survey results

4. Work with the section manager, staff of the respective sections, and data processing staff to prepare the production plans and requirements for each new publication/product. Provide special assistance by helping them visualize the publications/products and minimizing production costs in planning

5. Following approval/modification of new publication/product plans by senior management, work with the appropriate senior staff to develop procedures and establish schedules for the production of each publication/product

6. Estimate the cost which must be charged for each publication/product in order to cover costs and make a profit, if applicable

7. Work with representatives of database distributors and other organizations to arrange preliminary details related to the use of and reimbursement for the supplied data

8. Draft documentation required to support the production and distribution of each approved publication/product

9. Work with appropriate organizational staff to negotiate and monitor contracts and other agreements in support of production and distribution of publications/products

**ACTIVITIES**

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Database Coordination

10. Keep abreast of industry-wide standards for online databases

11. Work with senior data processing staff and staff of the respective sections to ensure that established standards are maintained in online files developed by the organization

12. Work with senior staff in the respective sections and data processing staff to develop methods for testing the technical integrity of each database prior to release of tapes for publication processing or for distribution to database distributors

13. Work with appropriate staff in the respective sections to ensure that the content data in each database is ready for release on schedule and fulfills quality and quantity requirements

14. Work with data processing staff, representatives of database distributors and photocomposition/videocomposition contractors to ensure that the data is released in formats compatible with the receivers' systems

15. Coordinate in-house preparation of documentation and training programs for representatives of database distributors; provide them with an overview of the content and potential uses of the data contained in each database

16. Coordinate staff review of database documentation created by database distributors for their clients

17. Coordinate the sending of computer tapes to the database distributors on schedule

18. Supervise the maintenance of documentation files for each database released to database distributors

19. Maintain a statistical record of the use of each database by database distributors' clients

20. Maintain a financial record of the royalty/usage charges received from database distributors

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Publications Coordination

21. Work with in-house staff and contractors to ensure that all deadlines are met in the production schedule for each publication

22. Coordinate operations related to the processing of illustrations for publications:

    make/obtain half-tone photos and/or line cuts
    crop photos as required and mark their locations on galleys
    write captions
    choose type
    paste up boards
    ensure return of negatives from publisher and file
    return artwork obtained on loan

23. Provide guidance, as needed, to senior staff of the respective sections in development of objective, user-oriented introductory materials for publication

24. Send galleys of introductory materials for typesetting

25. Coordinate the proofreading of the introductory materials by senior staff in the respective sections

26. Obtain computer tapes of the content data for each publication and send to the appropriate source for computerized photocomposition/ videocomposition

27. Receive the positive or negative camera-ready copy

28. Work with senior staff of the respective sections to coordinate the proofing of the camera-ready content data

29. Design or contract for the design of the covers for each publication

30. Establish a color rotation cycle for the covers of successive year's issues/cumulations

31. Obtain/assign publication numbers for each publication, as required (e.g., volume and issue numbers, in-house document numbers, publisher's series numbers)

32. Obtain an ISSN for each title published as a serial

33. Obtain Cataloging-in-Publication (CIP) data for each publication/ series

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Publications Coordination (cont'd)

34. Apply for copyright for each publication, if appropriate

35. Send the complete package of camera-ready copy to the printer with specifications for the size of the publication, the cover color(s), the type of binding, the type of paper, the number of copies (for in-house use and shipment to the distributing agent), etc.

36. For data to be published by special subject interest groups, send the camera-ready content data to the respective organizations for publication processing

37. For microform publications, send computer-output-microfilm (COM) and introductory copy to the appropriate contractor for the creation of the masters and production of copies. Specify the number of copies for in-house use and for shipment to the distributing agent

38. For special or occasional publications, provide guidance, as needed, to senior staff of the respective sections regarding writing the introductory material, so that the publication will not be outdated too quickly by use of time-linked wording

39. For approved reprint publications, send negatives, if available, to the reprint publisher; ensure that all negatives are returned

40. Keep track of costs related to production of each publication; note cost trends

41. Notify the respective sections of the costs associated with production of each of the publications

42. Supervise the maintenance of files related to production of each publication

Marketing

43. Prepare advertising brochures for each publication; coordinate review by appropriate in-house staff prior to publication processing

44. Request/purchase mailing lists from appropriate sources to reach the target audience for each publication

45. Coordinate mailing of samples of new publications to the editors of journals and reference guides in the appropriate subject fields

46. Work with a graphics designer to prepare copy for paid advertisements

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Marketing (cont'd)

47. Purchase advertising space in appropriate journals

48. Plan and staff exhibits of publications/products at professional meetings and conferences

49. Coordinate the preparation of a list of publications/products produced; publish the list as a separate or include the list (full or partial) in each title published

50. Contact known users of each publication/product to get feedback on ways the publication/product may be improved

Other

51. Assist users, as requested, in resolving problems which they may encounter in obtaining/using the publications/products

52. Attend professional meetings in the information field and in publications and product management; prepare reports for dissemination to staff

53. Keep abreast of developments in the information field that affect publications and product management

54. Develop contacts with other professionals in publications and product management

55. Perform special studies, as assigned

56. Forward suggestions for materials to be included in the indexing database to the designated senior indexer

57. Conduct business by phone, when appropriate

58. Write memos and letters, as required

59. Maintain a record of work performed

60. Make recommendations to the section manager for improvement in operation of the section

61. Attend and participate in staff meetings

62. Provide as overview of the operations of the section to visitors, as requested

**ACTIVITIES**

PUBLICATIONS AND PRODUCT MANAGEMENT — SENIOR LEVEL

Other (cont'd)

63. Train and supervise support staff, as required

64. Work to develop "esprit de corps" among co-workers and staff supervised

65. Assist section manager in writing job descriptions for self and for staff supervised

66. Assist section manager in developing performance standards for self and for staff supervised

67. Assess performance of existing equipment/systems used in the section and investigate capabilities of other equipment/systems

68. Recommend acquisition of new/additional equipment/systems

69. Train section staff in operation and maintenance of equipment/systems

70. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

71. Evaluate contractor's proposals

72. Write articles for professional journals/newsletters

73. Draft statements of section procedures and policies; draft revisions as required

74. Flowchart and document section procedures

75. Prepare manuals of procedures

76. Assist section manager in on-going systems analysis of the section

77. Analyze statistics for all operations in the section and prepare draft statistical reports

78. Assist section manager in preparing the annual budget for section operations

79. Function as section manager in his/her absence

COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

PUBLICATION/PRODUCT MANAGEMENT — SENIOR LEVEL

Basic knowledge

*** knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

** knowledge of the primary subject field of users served (e.g., medicine, chemistry, law, etc.)
* knowledge of foreign languages

Information Science Knowledge (Generic)

* knowledge of definition, structure, and formats of information
* knowledge of alternative approaches to the organization of information
* knowledge of alternative approaches to retrieval of information
* knowledge of alternative approaches to information management
* knowledge of available and emerging information technologies and their applications
* knowledge of completed and ongoing research in the field and its applicability to practice
* knowledge of career opportunities
** knowledge of how to learn on an ongoing basis

Knowledge about information work environments

* knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
* knowledge of the variety of work settings and their organizational structures
* knowledge of the functions performed within the various work settings and the services and products offered
*** knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

*** knowledge of the publications and product management functions, the range of services and products offered (both actual and potential)
*** knowledge of the activities that are required to offer the services and produce the products
** knowledge of the various resources that are necessary to support the activities
*** knowledge of methods and techniques for publications and product management
** knowledge of performance expected and how it can be measured
* knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)

PUBLICATION/PRODUCT MANAGEMENT — SENIOR LEVEL

Knowledge of how to do work

*** knowledge of how to perform the various activities (e.g., conduct market surveys, plan new publications/products, coordinate production of publications/products, etc.)
** knowledge of how to apply the methods and techniques of publications and product management
* knowledge of proofreading techniques and procedures
* knowledge of personnel procedures
* knowledge of the contracting process, both in general and within the organization
** knowledge of evaluation methods and techniques to evaluate systems, services and products
* knowledge of quality and production control techniques and procedures
* knowledge of public relations techniques
* knowledge of statistical description, analysis, interpretation and presentation
** knowledge of available systems, services and products to support publications and product management
* knowledge of the costs associated with resources (materials, personnel, space, etc.)
* knowledge of cost analysis and interpretation methods
* knowledge of methods of resource allocation
* knowledge of standards, measures and methods for evaluating personnel
** knowledge of alternative management structures and their implications for the operation of the section
* state-of-the-art knowledge of research and practice in publications and product management techniques

Knowledge of the organization and specific work unit

*** knowledge of the mission, goals and objectives of the organization
*** knowledge of the structure of the organization and the role of the section within the organization
** knowledge of the various projects and key personnel within the organization
** knowledge of the policies and procedures relevant to section operations
** knowledge of the various resources available within the organization (e.g., personnel, equipment, etc.)
** knowledge of the operations of other sections in the organization and how they relate to publications and product management

COMPETENCIES VALIDATED AS BECOMING
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COMPETENCIES VALIDATED AS
ESSENTIAL VERSUS DESIRABLE

PUBLICATION/PRODUCT MANAGEMENT — SENIOR LEVEL

Basic Skills

*** literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

*** perform each activity
*** establish rapport with colleagues
*** communicate well by written, verbal and non-verbal means
** collect, analyze and interpret data
*** make decisions and recommendations based on available information
*** work independently and in groups
** perform sedentary work
* develop criteria for evaluation
*** make effective, timely, and well-informed decisions
** isolate and define problems and develop the necessary criteria and action for their solution
** manage time effectively
* conduct an interview
*** conduct meetings with individuals and groups
** supervise staff
** arbitrate and negotiate
** anticipate long-range needs of the section and of information users
* design systems and procedures to improve section operations/products
* apply methods of measurement and evaluation
* budget and make projections
** optimize the use of organizational and section resources

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## PUBLICATION/PRODUCT MANAGEMENT

### Dispositional Attitudes

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*** Respect for the publications and product management section
** Respect for the parent organization

#### Attitudes Toward Other People

##### Toward Users

** Respect users
* Like people in general
* Like to help people
** Like to meet people
** Like to make others feel comfortable
* Sensitive to others' needs

##### Toward Others in the Workplace

* Respect co-workers
** Like to work with others/as a team
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** Willingness to draw upon and share knowledge and experience with others
* Supportive of co-workers
* Enjoy managing/supervising others

### Personal Qualities

** Alertness
* Assertiveness
** Compassion/Kindness
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*** Dependability
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PUBLICATION/PRODUCT MANAGEMENT

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